

A yellow map of the Thames Estuary Production Corridor is shown in the background. The map highlights the coastline and major waterways of the region, including the River Thames and the surrounding estuary. The text is overlaid on the map.

# THAMES ESTUARY PRODUCTION CORRIDOR

## Road Map for Growth: Screen Industries



The Backstage Centre, High House Production Park, Purfleet

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# Forewords

## **Justine Simons OBE**

### London's Deputy Mayor for Culture and the Creative Industries

The creative industries are moving east. This is a unique moment to create both a destination and a home for creative production in the Thames Estuary Production Corridor through the amazing partnerships which have been built through the programme.

The Thames Estuary is already home to a fast-growing network of screen-sector businesses, from gaming, animation and post-production, groundbreaking immersive and virtual technology, through to feature film studios with multiple sound stages. Recently we've seen major productions made in the estuary too – Sam Mendes' *Empire of Light* filmed at Dreamland in Margate, Marvel's *Black Widow* and BBC's *Luther* filmed on location in Barking & Dagenham not to mention Wes Anderson's *Isle of Dogs* and RuPaul's *Drag Race UK* made at 3 Mills Studios in Bow.

The Mayor of London has invested significantly in the future of the screen industries. We nurture future talent through our Creative Skills Academy, equipping people for screen industries jobs. We support Film London to help attract more productions to the city and our Unpacking the Credits project is demystifying creative careers for young people. We also invested £8m from our Getting Building Fund to support development of Eastbrook & The Wharf Studios and 3 Mills Studios in Bow.

But the screen industries sector is facing some real challenges nationally. There's a big skills and workforce gap to address, we need to attract more diverse talent, as well as meeting demand for content, reducing emissions and working towards net zero goals, including the Mayor of London's net zero target of 2030.

The Thames Estuary Production Corridor will operate sustainably, focus closely on achieving net zero, harness localised supply chains and create greener, more efficient systems through a circular economy.

**“Our cultural and creative industries are essential to the Thames Estuary – not just for a bright future, but also for the wellbeing of the communities living and working here.”**

We always travel best with the help of a good guide, and this Road Map for Growth shows how estuary leaders can make the best use of assets, expertise and infrastructure to unlock long term, culture led local growth and build on the success of our world leading culture and creative industries.

Our cultural infrastructure must be diverse and innovative, driven by local talent development and job creation. Insights on how to deliver this are set out in this Road Map for Growth, informed by research commissioned by the Mayor and Thames Estuary Production partners. We are publishing the findings for partners across the estuary to use and benefit from.

Join us, as we continue to grow our partnerships and achieve our vision for the world's largest creative production ecosystem.





The Wharf Studios, Barking and Dagenham





The Royal Docks, east London



# Kate Willard OBE

## Thames Estuary Envoy and Chair

As Government-appointed Thames Estuary Envoy, I am a proud supporter of projects that will deliver our Thames Estuary ambition to be a world-leading region for the arts, creativity and cultural production.

“The Thames Estuary Production Corridor shares our Thames Estuary Growth Board ambitions. The sector presents further huge opportunities – and with investment to support it, together we can make this happen.”

It's amazingly exciting to see already the rapid development of the screen sector in the estuary, from film & TV production, to games, animation and visual FX. Our role at the Growth Board is to champion and promote these opportunities domestically and internationally, sourcing new investment and making new and productive creative partnerships.

At the same time, we know the sector faces challenges around skills and talent development, challenges investors will want to see solved. We will work with the Thames Estuary Production Corridor which is committed to tackling this head-on by working with employers, educators and communities to develop the local and

diverse workforce the sector needs to build capacity and attract investment, businesses and talent. We will spread this opportunity across the estuary.

Working together we will realise the sector's exciting growth potential through support of new projects, new partnerships, new sector specific and digital infrastructure and by promoting our brilliant sector assets. The Thames Estuary Growth Board will be flying the flag for cultural production to investors and to Government, showcasing the estuary as the UK's number one growth opportunity.

As the Thames Estuary Production Corridor and our work together continues to grow, it will generate new jobs, nurture local talent, level up British making and manufacturing and attract new investment. It will enhance the Thames Estuary's leading reputation as a successful and inspiring place to live, work and innovative.

Imagine yourself at the top of St Paul's Cathedral facing east, looking over this incredible landscape that has inspired artists as wide-ranging and wonderful as Canaletto, Turner, Dickens and Dr Feelgood. Reaching out from London to the sea, and from the sea to the world beyond, the Thames Estuary is a dynamo of global reach, creativity, industry and opportunity.

We know that culture and the creative industries have historically and will continue to play an increasing and important role in the Thames Estuary's growth story. This Road Map for Growth shows how you can be a part of this story, one powered by the Thames Estuary Production Corridor and a stronger, greener, fairer and more inclusive cultural production community.

My call to action is simple – join us.

# Sarah Dance

## Chair of South East Local Enterprise Partnership

The Thames Estuary's rapidly growing cultural production network comprises film studios and fabricators, dance schools and digital production houses, music and media facilities – all the building blocks of the UK's creative and cultural economy.

We know that the region has seen amazing growth in the screen sector over the last five years, and building upon a proud heritage of creation, invention and manufacture. Together, we are evolving the estuary's legacy landscapes of industry and trade into a 50-mile corridor of culture-creation facilities.

The screen industries sector in the Thames Estuary to continue to grow at pace, but we need to work together to keep up with rising demand - for skilled workers and crew, for production space, for investment and for the infrastructure needed to support that growth. Through the Thames Estuary Production Corridor research commission so much has been learned about the spaces and infrastructure available within towns and cities across the estuary to support growing cultural ecosystem. Thames Estuary Production Corridor has worked with borough partners to explore in detail how cultural production fits into their local profile to help create jobs and sustainable growth. This report represents the next phase of that work, laying out the steps needed to meet that demand and how you can harness the sector's momentum for the benefit of local communities, our economy and the region's long term future.

**“A vital piece of this puzzle is about embedding and supporting new infrastructure projects.**

**Everything from world-class international film studios to innovative production facilities, SMEs to micro businesses and freelancers must all find a place within our growing creative clusters.”**

By supporting and incubating innovation and R&D focused projects as well as the bigger players we can not only create content but also retain intellectual property locally which is essential for long term sustainable growth.

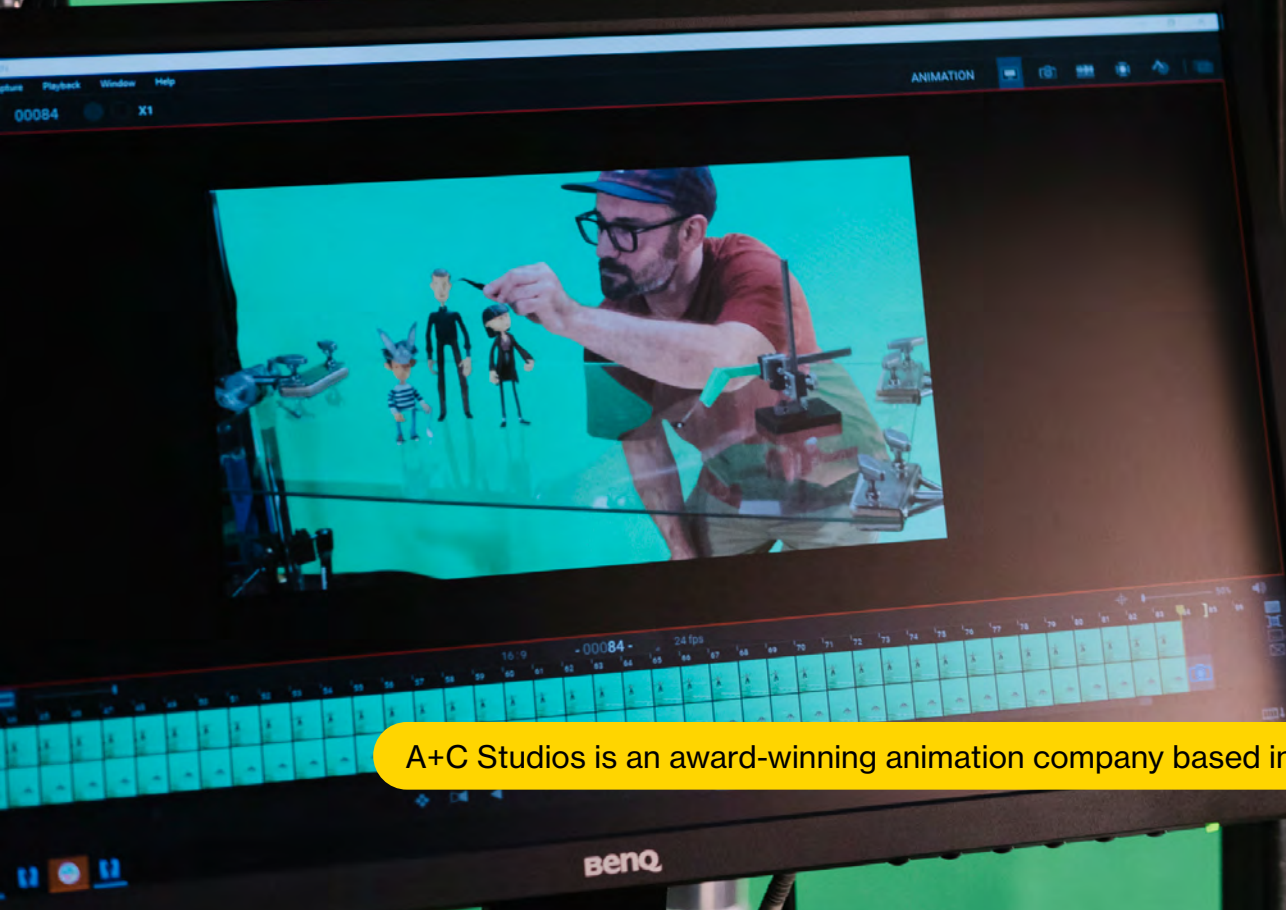
There's already an emerging framework in place to support the sector, but we'll need to strengthen this in order to grow. For example the South East Creative Economy Network works to accelerate growth in the digital, creative and cultural sector and the Create South East programme helps creative talent across the South East to develop and secure investment opportunities.

Successful cultural infrastructure needs the support of many sector players; policy makers, educators, planners, investors as well as the creative sectors themselves. You can be part of this growth story by joining the growing cultural production community. This Road Map for Growth will help to drive that work forwards to position the Thames Estuary as the centre of cultural production for Britain's creative industries.





A+C STATION 05



A+C Studios is an award-winning animation company based in Margate





The Factory, Royal Docks

The Thames Estuary Production Corridor is a significant programme uniting east London, the North Kent Coast and South Essex to build on the strength of the creative economy in the region. The goal is to create a world-class centre for creative and cultural production.

The programme brings together local councils, developers, screen industry leaders, institutions, businesses, education providers and community organisations. Together, we are working to secure a future for the South East as the place to create.

# Shared growth through cultural production

## Why here?

The Thames Estuary is backed by Government as the UK's biggest growth opportunity. The region has the potential to create 1.3 million jobs and add £190 billion to the nation's economy by 2050. The Thames Estuary is home to film studios and fabricators, dance schools and digital production houses, music and media facilities – all the building blocks of the UK's creative and cultural economy. The Thames Estuary Production Corridor harnesses this strong base.

## Why is it important?

It's a way for partners in the Thames Estuary region to work together to achieve something that is bigger than the sum of its parts – involving 18 local authorities, key sector organisations, education, business and communities.

The creative economy is growing nationally. The Thames Estuary Production Corridor is a way to secure this growth locally and connect residents to its benefits.



Research shows that the Thames Estuary has the potential to double its creative production economy, creating 50,000 jobs, generating £3.7bn for the UK economy and becoming the UK's largest concentration of creative production. The Thames Estuary Production Corridor is a way to meet this potential and ensure that a wide range of people and places benefit.

The Thames Estuary Production Corridor will also help to build more creative places – finding new uses for our high streets, town centres and neighbourhoods, rejuvenating places through culture-led investment.

## **What is at stake without the programme?**

**Demand goes elsewhere:** There is demand for more cultural production space and skills in the Thames Estuary. If we don't respond, we risk it going elsewhere – losing out on investment, jobs and talent development.

**Missing net zero opportunities:** Without focused, shared effort, the estuary will not grow in a way that meets pressing net zero targets.

**Dampening innovation and skills development:**

Without building new cultural production infrastructure, we lose the chance to lead innovation in production techniques and people across the estuary lose opportunities to apply or develop their skills to take part in this economy.

**Losing out on diverse talent:** Without a commitment and joined up action to attract and retain a more representative workforce, there is a risk that the creative economy grows in a way that does not represent or benefit all of the estuary's communities.

**Jeopardising the UK's global position:** To remain competitive, the UK's creative and cultural economy needs to be at the vanguard of cluster development. Without proactive leadership, the UK risks losing ground to its global competitors.



Aden Hynes Sculpture Studios, Basildon





Aden Hynes Sculpture Studios, Basildon



## Using this road map

The evidence in this road map shows what cultural production can deliver as a model for local and regional growth. Since the Thames Estuary Production Corridor vision emerged in 2017, there has been major investment in cultural production from both the public and private sector. With a series of state of the art creative and cultural production centres in the pipeline, now is the time to build on momentum and cement the Thames Estuary's leading role in cultural production nationally and globally.

This road map is a tool for local leaders across industry, policy, planning and development to deliver cultural infrastructure that enriches communities and places. This document sets out the estuary's screen industries landscape, highlighting what the sector is already delivering, and what the opportunities for growth are.

It supports case making, attracting new investment and strategic planning for cultural production across the estuary.

This road map is part of a bigger package of tailored support and guidance available through the Thames Estuary Production Corridor and our partners for policy makers, sector organisations, operators, educators, investors and communities of all kinds looking to find a place in the estuary's growing cultural production ecosystem.

The Thames Estuary Growth Board Plan, 'The Green Blue', provides further context for the opportunities set out in this road map - setting out how the Thames Estuary will transform through harnessing the power of the Thames, improving infrastructure and becoming a hub for creative programmes.

Supported by the Thames Estuary Growth Board and the forward-thinking Creative Estuary programme, this road map sets out how, together, we can deliver real change for the estuary by:

- Attracting investment
- Promoting our assets: Land, workforce, institutions
- Unleashing space
- Transforming our approach to sustainable development

The screen industries sector is rapidly transforming. This is driven by technological innovation, consumption habits and a need to be greener.

The screen industries are growing faster across the Thames Estuary than anywhere else in the UK, including London. Centred around the estuary's key production hubs, it's also providing work outside of the region. Demand for space and skills to serve the industry is projected to continue at pace. It is imperative that estuary leaders work together to harness this growth in a way that serves local people and places.

## **Priorities for the screen industry in the Thames Estuary Production Corridor**

**Net zero:** Support a thriving and distinct ecosystem working to meet net zero targets.

Be a champion of net zero and the circularity principles. It will work to make sustainability a key competitive advantage.

**Innovation and skills:** Drive industry-readiness and scale-up talent development and capabilities.

Ensure that a credible, diverse, and high quality workforce and supply chain is developed alongside infrastructure. Coordinate this to match the production pipeline.

**Diversity:** Make the sector more accessible and support the development of a diverse and inclusive screen culture.

Support diverse future leaders in the screen industries. Help to nurture diverse audiences and future producers across the region.





Silvertown Studios, east London



# Why grow the screen sector here?

## Well-established screen production facilities and strong networks

The significant production assets that already exist include large scale facilities like High House Production Park, Here East and 3 Mills Studios. These are complemented by a network of established and emerging industry clusters and production supply-chains, and a rapidly improving superfast broadband network.

## Screen skills for growth and innovation

The Thames Estuary Production Corridor hosts a dynamic network of education institutions to skill up students to work in the screen industries. They can also create new pathways, partnerships and collaboration models to address screen industries skills gaps. These will focus on digital, gaming and immersive technologies.

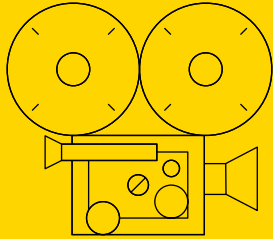
## Catalytic screen industries infrastructure projects

Several industry leader and public sector-backed screen infrastructure projects are in the pipeline. These include Eastbrook Studios, London's largest film and TV production centre in Dagenham. Other examples are Purfleet's media village, zero-emissions virtual production soundstage in Thamesmead and a virtual production research centre in Greenwich. There is also a new storage facility for the film industries in Southend-On-Sea.

## Net zero ambitions and capabilities

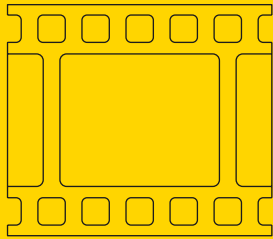
The estuary is set to become one of the UK's leading hubs for hydrogen. Infrastructure is being put in place to encourage a modal shift to the river for freight and passengers. This will spearhead the development of decarbonisation technologies across the region. This will support and amplify the sector's specific net zero objectives

# The screen sector in the Thames Estuary Production Corridor is:



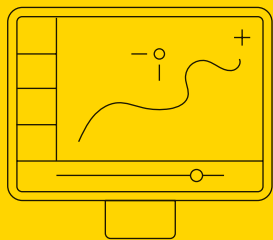
## Film and TV production

This sector largely consists of small independent film and video production businesses and a freelance workforce gravitating around Thames Estuary Production Corridor's key production hubs. The region has attracted a range of national and international TV and stage productions in recent years. These include award-winning series Killing Eve and Dr Foster, Downton Abbey and international blockbusters Wonder Woman and The Batman.



## Animation for Film, TV and commercials

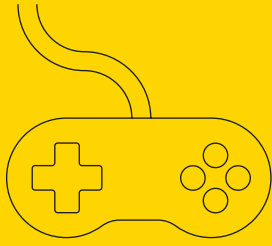
Driven by emerging technologies and brilliant storytelling, the sector is developing in the Thames Estuary with the presence of key studios. Examples include A+C Studios in Margate which has worked on the Lego films. Another is Dazzleship in Tower Hamlets which worked on the 2010 remake of James Bond Goldeneye. The sector is supported by a growing pool of freelancers and micro-businesses providing subcontracting services across film, TV and advertising.



## Post-production – Visual FX and Virtual Production

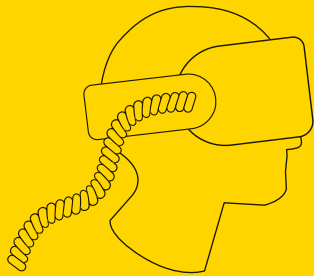
An estimated three quarters of the UK post-production industry operates in London and the South East. The Thames Estuary Production Corridor has high quality university courses in VFX. Ravensbourne University has historically had strong links with the industry and high quality graduates. Innovation and infrastructure provision is growing: World-renowned virtual production company Mo-Sys is opening a new hub in Greenwich.





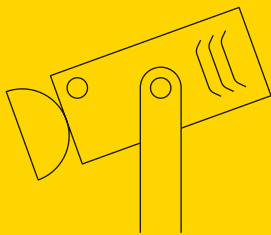
## Gaming and eSports production

Whilst starting from a low base, the gaming sector is emerging strongly in the Thames Estuary Production Corridor. British video gaming industry giant Dovetail Games moved to Chatham Historic Dockyard in 2015. This also hosted the Medway Rapture Gaming Festival in summer 2022 bringing together industry leaders. New gaming and eSports courses have recently opened at Mid Kent College, the University of East London and Basildon's new Centre for Digital Technologies. This will create a new talent pipeline and help grow the sector in the production corridor.



## Digital and CreaTech

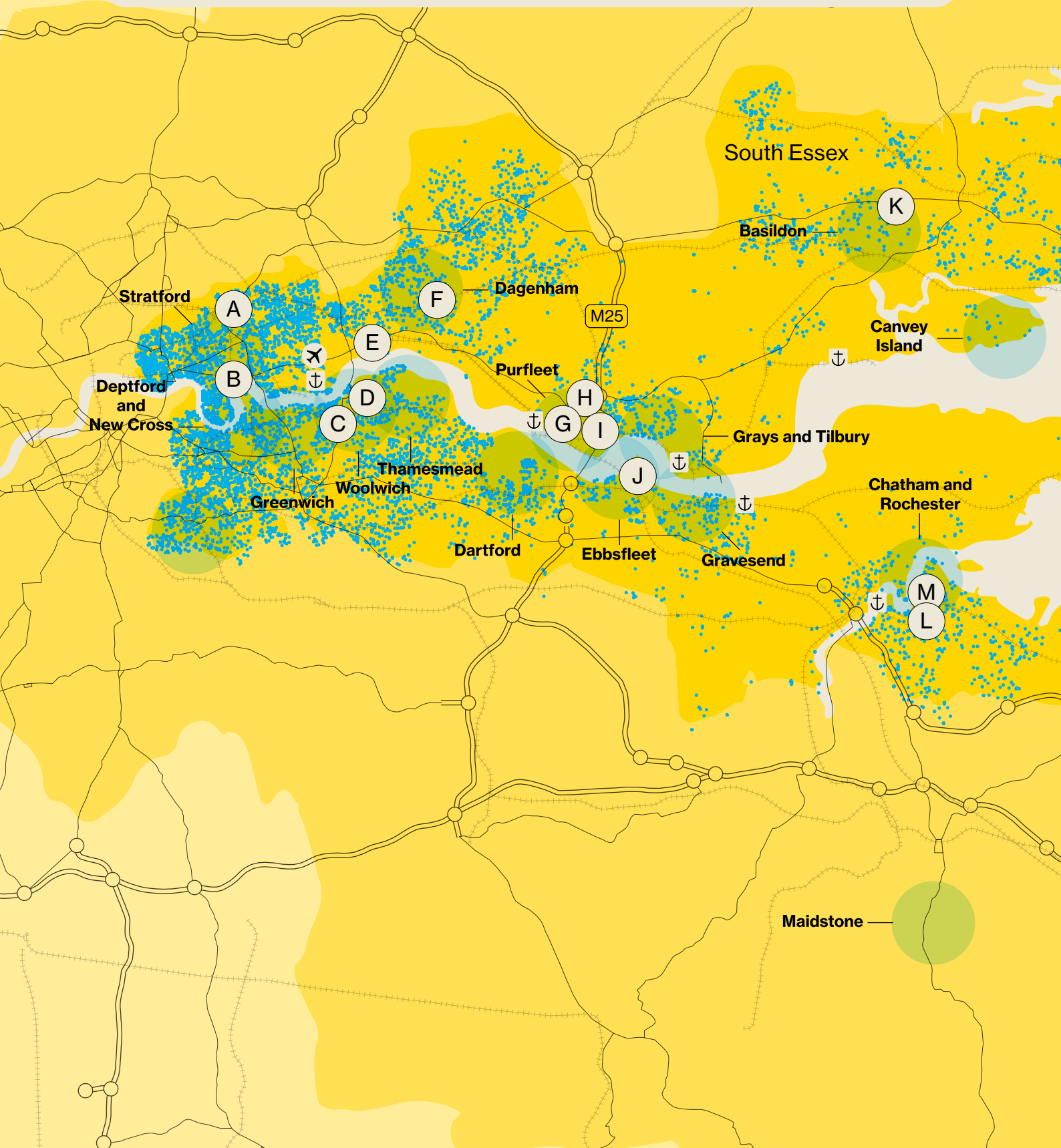
Technical and digital innovation is driving rapid progress in immersive technologies, computing and the internet of things. The production corridor has an important digital sector with a pool of small and diverse creative businesses working across healthcare, education and automotive industries. Some estuary places, such as Stratford or Basildon are already on the map as emerging clusters for digital and CreaTech industries. These complement the region's strong foundations in creative and ICT.



## Supporting creative industries

The screen production ecosystem in the Thames Estuary Production Corridor is supported by a range of practitioners. This includes music and sound operators and specialists, photographers, set and costume design, casting agencies, advertising and marketing as well as logistic companies. The Thames Estuary Production Corridor is home to an array of businesses and freelancers working on this broader supply chain. Kent and Essex also have key strengths in manufacturing, logistics and construction. This opens up opportunities for businesses not yet active in the sector.

East London has very high levels of specialisation in screen production. The increase in both screen industries jobs and businesses in Essex and Kent outperforms both London and UK growth. This is from a smaller base, but shows rapid growth.







Key clusters of screen industry production businesses across the estuary. Major facilities include:

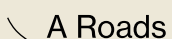
- |                           |                                |                         |
|---------------------------|--------------------------------|-------------------------|
| (A) Here East             | (G) High House Production Park | (L) The Docking Station |
| (B) 3 Mills Studios       | (H) The Backstage Centre       | (M) Dovetail Games      |
| (C) Mo-sys Studios VR HUB | (I) Purfleet Media Village     | (N) Saku Productions    |
| (D) Indie Zero Studios    | (J) London Resort              | (O) Fire Eye Land       |
| (E) The Wharf Studios     | (K) Underwater Studio          | (P) A+C Studios         |
| (F) Eastbrook Studios     |                                |                         |



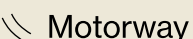
Further clustering opportunities for screen industries infrastructure, anchor businesses and/or education providers



Dock



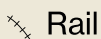
A Roads



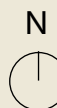
Motorway



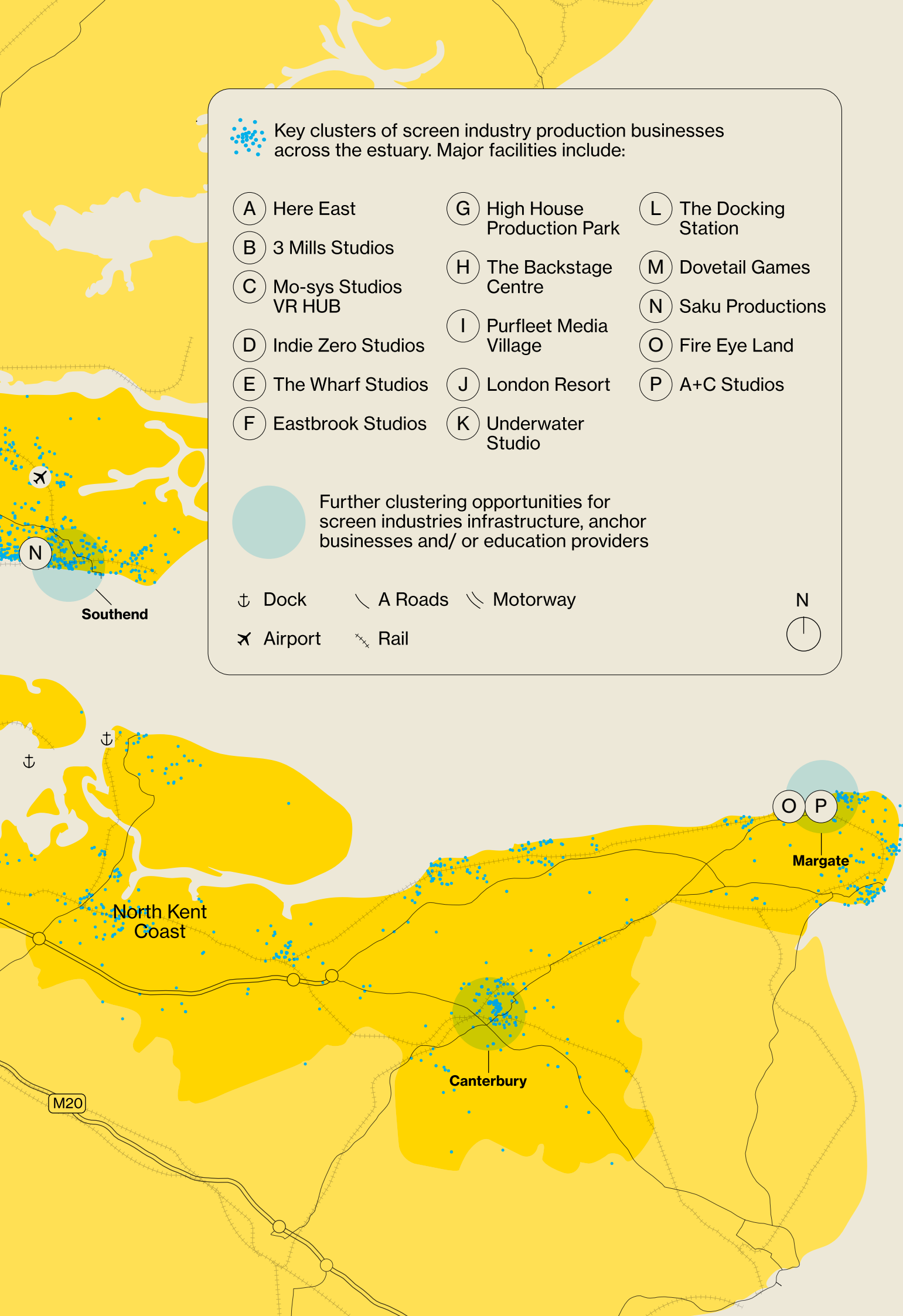
Airport



Rail



N



“As the UK’s world class film and TV industry continues to grow, investments in both our skilled workforce and new cutting-edge production facilities are crucial. It’s therefore encouraging to see the Thames Estuary Production Corridor’s approach to developing the region’s screen sector to meet the needs of our industry, and further strengthen the UK’s production offer.”

**Adrian Wootton OBE**

Chief Executive of Film London and the British Film Commission





Royal Opera House production workshop at High House Production Park, Purfleet

## **Making it:**

# A+C Studios

Based in a converted Victorian building in Margate, A+C Studios is an award-winning animation company specialising in stop-motion and animation for advertising and social. Their clients include the Lego Group, British Airways and Cadbury.

After starting up in Whitstable in 2007, the company moved to Margate almost a decade ago, and now occupies a 5,000 sq ft production space there. It has three production spaces – one with a built-in infinity curve, a fully equipped model-making workshop, a top-tier digital animation studio and post-production suites. A+C Studios can produce anything from paper-craft to motion design and employs more than 15 talented individuals.

A+C is championing both the animation sector and Margate as a creative place. The company has an intern programme with local colleges, and works with young people and local creatives and freelancers as much as possible. They also regularly support local and national charities including Thanet Winter Shelter or the Garden Gate project in Margate with creative workshops.





A+C Studios, Margate

# The case for the screen sector

There is clear demand for screen production in the estuary as well as significant momentum and regional capacity. The Thames Estuary Production Corridor can provide the infrastructure, facilities and skills to meet this demand.

Between 2016 and 2021, and despite the Covid-19 pandemic, more than 840 screen industry enterprises located into the Thames Estuary Production Corridor. This grew the sector by 42% to 2,005 businesses - more than double the UK average growth rate.

As a result, 1,200 new screen industries jobs were created with a 25% increase in employment. These figures suggests a surge in new micro-businesses and sole-traders rather than growth in productivity and employment from a pre-existing business base.

In addition, UK Production spend rose from £2.85bn in 2016 to £5.64bn in 2021 (BFI, 2022), a compound annual growth rate of 14.6%. If this pattern continues, annual production spend should reach £11.16bn by 2026. The UK needs to meet this rising demand so this incredible growth doesn't squeeze studio space, production facilities, skilled workers and crew.

8%

growth of the gaming industry in the UK per year between 2017 and 2022<sup>1</sup>

£911.9m

value of UK animation sector<sup>2</sup>

£62.5bn

will be added to the UK economy through VR & AR by 2030<sup>3</sup>

6m sqft

of additional studio space needed by 2026<sup>4</sup>

4,805

people employed across film & TV, animation, post-production, e-sports and gaming, AR/VR and digital production businesses

7,500

estimated screen industries freelance workforce

£820m

estimated direct and indirect economic contribution of screen production in the Thames Estuary

<sup>1</sup> IBISWorld, 2022, Video Games in the UK – Market Size 2010-2028

<sup>2</sup> Nordicity, 2021, The Value of Animation to the UK Economy

<sup>3</sup> PwC, 2019, Seeing is Believing: How will virtual and augmented reality transform the economy?

<sup>4</sup> Knight Frank 'Taking Centre Stage' 2022. Approx. 5m sqft of studio space to be delivered between 2023-2026, with 2m sqft under construction



“I’m very excited about the potential of the Thames Estuary Production Corridor to deliver economic development throughout the Thames Estuary through screen production. As the longest running Film/TV studio in the estuary, 3 Mills Studios is proud to help power skills opportunities, business development and new jobs in the growing cultural production sector.”

**Paul de Carvalho**

General Manager/ Head of Studios of 3 Mills Studios





3 Mills Studios, east London





Royal Docks, east London



# Accelerating action

Almost £400m has been invested in the estuary's cultural production sector since 2017. Hundreds of potential production sites are mapped across the region. With an engaged education sector, a latent talent pipeline and major new projects in progress, the Thames Estuary Production Corridor is a key part of this amazing growth story.

We are working with local and regional partners with expert knowledge to ensure new cultural infrastructure projects meet local priorities and offer communities what they need to thrive. Government investment is in place to support a long-term strategy.

An exciting pipeline of cultural production projects for the estuary is well underway, owned and managed by partners. As part of this pipeline, two large scale strategic screen sector 'Accelerator Projects' in Basildon and Margate are well positioned to fuel local growth and recovery.

## **Accelerator project:**

Creative campus for screen and immersive digital industries, Basildon town centre

Partners have co-funded and secured investment, including £4.49m from the Cultural Development Fund (CDF), for affordable and flexible space for creative production, specialist and grow-on screen production space and dedicated space for digital experiences and events. The campus will revitalise parts of Basildon town centre and offer a wide range of further education and employment opportunities for local people.





## **Accelerator project:**

### **Screen mixed media hub, Margate**

A high level vision, strategy and delivery pathways have been set out for 55,300 sqm (595,000 sqft) of screen, mixed media, creative production and supporting uses. Proposals include screening spaces, venues, production and animation studios, an educational hub, as well as supporting crew and ancillary functions. This will enable the town to capitalise on its growing animation specialism (anchored by A+C Studios) and provide space for Margate's growing screen and media freelance economy.







## **Making it:**

# Dovetail Games

Dovetail Games is an award-winning and fast-growing developer and publisher of market-leading simulation entertainment software, based in Chatham. It specialises in the simulation video game genre.

Dovetail Games has grown quickly from a 2008 start-up to employing over 200 staff by 2019. The team is a blend of industry experts and new talent. Close proximity to local universities and London allows the company to access the skills it needs. It is proud to recruit mostly from the local area. Dovetail Games is at the heart of the creative-led transformation of Chatham's Historic Dockyard. This is now being reinvented as a high quality international creative digital hub. As anchor tenant, it has helped influence positive perceptions of the area as a place for creative businesses to establish and flourish.

In 2019, it was estimated that Dovetail Games generates £12.3m in GVA (direct) and contributes over £21m in GVA for Medway's local economy.





Chatham, Medway

# What is needed for progress?

The following pages outline the main gaps and opportunities in the estuary's screen sector.

Estuary leaders and local agencies are best positioned to know how to fill these gaps with local assets and local economies in mind. Towns and cities across the estuary have a chance to claim their part of the estuary's creative industries story by directing local strategies in response to these opportunities.

This section also sets out priorities for new infrastructure and types of future projects which will drive resilient and sustainable growth, support innovation and attract investment.

Strategic support from Thames Estuary Production Corridor partners at regional level will also offer access to wider networks, resources and markets. In combination, these local and regional efforts can build a long-term sustainable competitive advantage for the Thames Estuary in the screen production sector.





The Wharf Studios, Barking and Dagenham





3 Mills Studios, east London, completed a £6m renovation in 2023



# Gaps and opportunities

## Gap: Scale up and connection capacity

Revenue streams in the industry are usually tied to project-based commissions.

The screen industries sector in the Thames Estuary is typically characterised by lots of different small firms. More than 96% of screen production businesses have fewer than 10 employees. Their size means that they can lack capacity, and can't be expected to scale up without the right kind of support. As such, the sector faces competition from highly integrated global companies with greater capacity to invest in R&D, skills-building and innovation.

Existing businesses and practitioners don't typically have the resources or time for horizon scanning, capacity building or medium/long-term investment in R&D. Too much screen production in the estuary is still 'show and go'. In other words, creating content but holding none of the intellectual property needed for long-term sustainability and growth.

Additionally, research from Screen Skills shows that around 36% of the digital and gaming industry workers are freelancers. The BFI estimates that 55% of the Film and TV production workers, including animation and post-production, are freelancers. This means that the Thames Estuary Production Corridor could have around 7,500 freelance workers - a fantastic asset, but one that needs joined up working in order to be protected and maximised.

Delivering more large-scale infrastructure projects in the Thames Estuary Production Corridor will help the sector to develop innovation capabilities via investment in R&D and to build stronger clusters around existing and future. This will enable knowledge sharing between the 'big' and the 'small', as well as scaling-up and growth of the existing business base.

Stakeholders also report a lack of network structures and identity for the screen sector in the Thames Estuary. There is a need for a shared mechanism or structure to co-ordinate action and raise the profile of the industry in the region. Better networks will help develop relationships between existing local screen industry organisations and galvanise and catalyse this rich and diverse sector. By developing better physical and virtual networks, it will be possible to bring together businesses to create a stronger and more dynamic screen sector.

## Opportunity: Connect to regeneration efforts

Alongside major investment in large-scale creative production facilities, the estuary is also witnessing wider significant regeneration and change.

Recent public funding for cultural infrastructure has laid a strong foundation for growth. Projects in Stratford, the Royal Docks, Woolwich, Thamesmead, Ebbsfleet, Purfleet, and Margate have all delivered new cultural production capacity. Regeneration activities in Southend, Chatham and Basildon will create further opportunities, as will East Bank, which is delivering the biggest cultural investment in a generation at the Queen Elizabeth Olympic Park.

The Mayor of London's Good Growth Fund and the Cultural Development Fund delivered by Arts Council England on behalf of the Department of Digital, Culture, Media & Sport provide clear examples of targeted funding with interlinked culture and regeneration goals.

Across the Thames Estuary there has already been high uptake of other recent government funding streams aimed at high streets and town centres. Local councils across the corridor have bid for around £200m from the Future High Street Fund, Town Deal and Levelling Up Fund. Some of this funding has already been confirmed. This offers a clear opportunity to join the dots between town centre and place-based regeneration projects and screen production industries sector growth.

### Case Study: Creative Estuary

Creative Estuary is forging a new future founded on creative energy and innovation, along the length of the Thames Estuary. It is transforming some 60 miles across Essex and Kent into one of the most exciting creative clusters in the world, initially supported by investment from Department of Digital, Culture, Media & Sport's Cultural Development Fund and now Arts Council England. Creative Estuary is led by the University of Kent on behalf of a group of public sector and cultural organisations.

Since 2019 Creative Estuary has been delivering a number of projects and programmes:

- Creative Estuary Co-commissions, supporting new commissions for estuary-based producers, organisations and artists.
- Estuary Festival, a multi-arts festival shining a spotlight on the Thames Estuary region.
- The Estuary Producers Network, connecting artists and producers working across the creative industries in Essex and Kent.
- Ideas Labs, bringing together academics, technologists, businesses and cultural professionals, to share knowledge and explore culture-led solutions to contemporary issues across the estuary.
- Place Brand and promotion, creating a new narrative for the region and promoting opportunities nationally and internationally.
- Re:Generation 2031, which empowers young people aged 16 to 25 years in disadvantaged parts of north Kent and south Essex.
- Creative Assets Development, working to bring underused spaces back into creative use across the region through feasibility studies, research and brokerage.
- Cultural co-location, finding holistic ways to integrate cultural infrastructure into community buildings and outdoor spaces.





Royal Opera House production workshop at High House Production Park, Purfleet





A+C Studios, Margate



## Gap: The skills challenge

In the Thames Estuary Production Corridor, the presence of high quality universities and education institutions helps to support and train new talent. Yet some sub-sectors (postproduction, gaming, immersive tech) are still reporting skills shortages. In particular, the changing nature of work and technology is driving huge demand for greater skills convergence across digital. Production growth in the film and TV sector is also straining local resources.

In 2020, only 25% of the screen industry's workforce were from lower socio-economic backgrounds. This compares to 38% of people across the wider economy. Thames Estuary Production Corridor needs to work to attract and advance diverse talent. For larger employers and inward investors, being able to access London's pool of skilled labour across various disciplines is a

key draw. However, local skilled workforces need to be developed, with clear pathways to the industry and the provision of supportive infrastructure. This would increase production, capacity, capabilities and job creation in the Thames Estuary Production Corridor.

We need support to address skills gaps and shortages in technical, creative and management roles. When new or improved screen production infrastructure is created, whether large-scale facilities or smaller workspaces, it must be planned with skills development in mind. We must support learning and development at all career stages, and provide clear pathways so the region can attract, develop and retain talent.

## Opportunity: Skills for the future

Local further education colleges, independent training providers and higher education institutions are ready to deliver the training the screen industries sector needs. This offers much potential in terms of growing the creative workforce across the estuary. The University of Kent is in the UK's top 10 universities for film production. Ravensbourne University is a top 5 UK university for studying VFX and animation. Finally, Goldsmiths, University of London is one of the 10 UK universities running courses in immersive technologies.

The higher education sector is doing more to address the screen industries skills gaps, opening new courses on immersive tech and creative business development. This is accompanied by more technical or 'hands on' training provided by local colleges and industry-led education providers.

Infrastructure provision and investment in the screen industries must align with the 'fairness agenda' emerging across the Thames Estuary and actively target social mobility 'cold spots', widening access to education, training and skills pathways into the industry and promoting equality, diversity and inclusive growth.

### Case Study: Fostering research and innovation in the screen industries

Goldsmiths' Institute for Creative and Cultural Entrepreneurship provides business and management education to the creative sectors, with specific pathways in computing, media and communications. The University for the Creative Arts also hosts multiple research programmes. These include the Animation Research Centre, Audio Research Cluster, the centre for Cinema, Affect, Place.

## Gap: A lack of production space

Thames Estuary screen stakeholders report a lack of flexible, agile and medium-scale facilities. These are needed to support a variety of regional productions, new media developments and workforce development. A lack of start-up and grow-on spaces (larger spaces for businesses seeking growth) for digital and post-production businesses and freelancers has also been identified as a production space barrier.

Without adequate and appropriate production space, the stability, and reliability of screen industries supply chain will suffer. There is also a need for short-term and versatile production spaces. The shortage of studio space has triggered a wave of plans and proposals for new purpose-built studio space across the UK. There is now more than 5 million sq ft of planned studio space in the pipeline. Some 60% is in London and the wider South East.

## Opportunity: Dynamic property market and fresh approaches to land and planning

The Thames Estuary's commercial property market is outperforming the UK average, showing that the estuary is an attractive business location. In this context, policymakers and developers have a vital role to play in directing this dynamism to serve wider place-based goals.

Innovative work by the South East Creative Economy Network, the Creative Land Trust in Margate and London's Creative Land Trust demonstrate models of securing the right kind of space for cultural production

activities and ensuring the continued supply of affordable workspace in the future.

Culture and creativity are increasingly being embedded as part of planning and development. Creative Estuary's Cultural Planning Toolkit, Creative Enterprise Zones and affordable workspace policies in the London Plan and an increasing number of Local Plans all illustrate how planning can be used to direct development activity to help deliver and protect cultural infrastructure.

### Case Study: Margate Creative Land Trust

Margate Creative Land Trust was co-created by the community and local creative practitioners, and the organisation has been established as an independent charity by Thanet District Council on behalf of the Margate Town Deal Board.

Margate is home to a burgeoning creative community. Whilst creative businesses have grown by 158% since 2009, Margate has lost 11% of its commercial spaces in the last 20 years. When coupled with rising rents for the remaining eligible spaces and a lack of appropriate venues for the variety of artistic pursuits, there is a vital and urgent need to provide space to creative practitioners in order to protect and grow the creative industries in Margate.

Taking inspiration from the model developed in London for a Creative Land Trust to protect creative space in central London when property values are rising, the role of the Trust in Margate is ensuring that creative space and programming is inclusive and supports underserved communities to access opportunities within the creative industries of leadership, jobs, training and enterprise development.





Resort Studios, Margate





The Backstage Centre, High House Production Park, Purfleet



“Creative Estuary’s delivery has made visible the Thames Estuary Production Corridor vision and impact. We are committed to our partnership to support the evolution of this vision. Together we can achieve a great deal to ensure the sustained growth of the creative industries in the estuary. It’s an exciting opportunity to build a new narrative for the region as the centre of Britain’s thriving creative economy.”

**Lorraine Cox**

Director, Creative Estuary

# Infrastructure priorities

The following pages set out specific provisions needed to respond to the gaps in infrastructure for the screen production sector in the Thames Estuary.

Research and consultation with commercial operators, screen industries sector leaders and local councils highlighted key gaps in space provision for the sector.

In response to these gaps, several priority initiatives and projects have been identified to develop a transformational portfolio of screen assets across the region.

Ranging in both scale and scope, these projects have the potential to create value locally, build capacity and 'plug in' to the overarching cultural production ecosystem.

Local leaders can use these priorities and associated requirements to make decisions on how to best work with their own assets (land, workforce, institutions) to respond to the opportunities of the growing screen industries sector.



**Provide spaces for small to medium scale independent and commercial productions.**

These will complement the large-scale screen studio facilities now being developed, and cater for film, TV, as well as sound and photography.

**Develop specialist workspaces for the digital, animation and immersive industries.** This will build capacity, encourage collaboration and allow the sector to scale-up.

**Create a regional screen hub leading film, culture and digital media in the production corridor.** This includes producing and presenting original audiences and content, and curating a diverse programme of talent development, cinema, exhibition and events.

**Setting up a circular and reuse screen centre to lead on net zero and circular best practices.** This will also provide jobs and training opportunities in green fabrication, creating new pathways into the sector.

## **Making it:**

### **3 Mills Studios**

With 9 filming stages, 10 theatre rehearsal spaces and over 75,000 sq.ft of filming space, 3 Mills Studios has hosted many film, TV and stage productions including Wes Anderson's Isle of Dogs, Legend for Working Title Films, BBC's MasterChef and RuPaul's Drag Race UK, and most recently high-end TV dramas The Great for Hulu and The Third Day for Sky Atlantic.

It is one of the most accessible studios in the UK with excellent transport links to central London. On an attractive and historic island oasis, it offers production offices, construction and prop stores, make up, costume and green rooms and a mix of production related tenants such as catering, camera hire and casting. It has inspired some of the most successful independent filmmakers including Danny Boyle and Terence Davies, and has been home to countless television commercials and music videos.

In 2023 3 Mills Studios completed a £6m renovation, creating over 10,000 sq.ft of new creative workspaces and supporting more than 1,000 jobs in east London.





3 Mills Studios, east London



### Here East

Here East is one of Europe's most advanced creative and digital hubs. It hosts innovative and creative companies, tech incubators creative studio spaces, a number of university hubs, dance company Studio Wayne McGregor as well as film and broadcasting studios.

### Underwater Studio

Tucked away on a quiet industrial estate, the Underwater Studio is a unique facility for filming underwater scenes for Films, TV Prop Promos, commercials and stills shoots located in Basildon. It has attracted names such as Harry Potter, James Bond and EastEnders.

### 3 Mills Studios

Situated on an island oasis in east London, 3 Mills has provided a stage for world-class film and tv for 30 years. It features 9 filming stages, 10 theatre rehearsal stages and over 75,000 sqft of filming space.

### Eastbrook and Wharf Studios

LA-based Hackman Capital Partners are developing 18 sound stages across two sites in Barking and Dagenham. Together, the studios will be creating an estimated 1,600 jobs contributing £40m per year to the local economy. The investment also includes an endowment to maximise local jobs, apprenticeships, community outreach and supply chain opportunities.

### Indie-Zero

London's first independent net zero film and virtual production facility will open in Thamesmead. The studios will house four new sound stages, a cutting edge LED screen (VP), production office space, construction workshops a restaurant / bar and meeting space. It will also host set construction services and INDIE-30, a creative, tech and sustainability focused start-up incubator.

### The Backstage Centre

Based at High House Production Park in Purfleet and just 11 miles from London City Airport, the Backstage Centre is a versatile 10,000 sq ft purpose-built rehearsal and training sound stage and studio facility.

### Plumstead Power Station

The Plumstead Power Station in Greenwich is being refurbished. Virtual production technology pioneer Mo-Sys will make the complex its headquarters. It will also create eight studio stages, a home for a new virtual production festival as well a virtual production R&D and training centre.

South Essex

East London



### **CAMA AssetStore**

Family run storage and sustainability service provider CAMA is developing CAMA AssetStore at Airport Business Park in Southend. This is a sustainability-focused storage and asset management facility specialising in the reuse of sets, props and costumes for film and TV. By investing in the circular economy, CAMA helps the film industry to reduce both production budgets and carbon impacts. CAMA also supports smaller productions, sixth form academies and charities with donations of items no longer needed.

### **Examples of existing screen industry infrastructure across the Thames Estuary Production Corridor.**

Additional infrastructure is needed to supplement and enhance this production ecosystem.

⚓ Dock

↘ A Roads

✈ Airport

+++ Rail

N

≡ Motorway



### **Author Colour Studio**

Author Colour Studio is Saku Productions' boutique post production, colour grading and editing suite. Fully equipped and available for hire, it is located in a repurposed high street unit in Leigh-on-Sea, only 40mn from London via C2C train and 15mn driving from London Southend Airport.

### **Fire Eye Land**

Fire Eye Land is Margate's biggest photography and creative production space. It is located in an industrial yard in a quiet residential neighbourhood and is regularly used for fashion, music videos and advertisement shoots.

### **The Docking Station**

The Docking Station is a project by Medway Council, Chatham Historic Dockyard Trust and the University of Kent's Institute of Cultural and Creative Industries. It will convert a Grade II listed building into a creative digital hub. This will provide state-of-the-art digital facilities, flexible co-working spaces and an immersive interactive space for both research and presentation projects. Construction is planned for 2024.

### **Ashford International Film Studios**

Located just to the south of Thames Estuary Production Corridor, a redundant 12.6 acre former railway works will be transformed to provide four TV and film studios with associated post-production offices and workshop spaces. Together, these will make up Ashford International Film Studios. The £250m project will also deliver a hotel, serviced apartments, restaurants and retail spaces as well as housing and business space.

North Kent Coast

M20

# Spaces for small to medium scale independent and commercial productions

|                           |  |
|---------------------------|--|
| <b>What</b>               | <b>Flexible studio and production spaces for film, TV, photography and sound</b>   |
| Rationale and opportunity | The provision of non-broadcast and short-form content has increased. We also need to cater for Thames Estuary Production Corridor micro-production companies and freelancers. This is an opportunity to increase provision of small-scale flexible and fully equipped studio spaces, complementing the large-scale screen studio facilities in the pipeline. These spaces typically cater for short-form video content, commercials and smaller budget productions as well as photography shoots. There are hardly any of these spaces outside London, so production companies in Kent and Essex must travel to the capital for shooting days. |
| Key characteristics       | <ul style="list-style-type: none"> <li>• Usually offer more than one studio space, ranging from 250sq.ft to 1,500sq.ft</li> <li>• Usually operated by an independent and specialist workspace provider but can be part of a broader commercial / creative workspace complex</li> <li>• Can include studio suites, sound recording studios, as well as postproduction services / equipment rental</li> <li>• Typically available to hire by the day or the week</li> </ul>  |
| Requirements              | <ul style="list-style-type: none"> <li>• Central location with on-site car parking and good public transport accessibility</li> <li>• Minimum clear height of 4m</li> <li>• Soundproofed studio with vibration isolation</li> <li>• Capable of accommodating high powered computers and servers</li> </ul>   |
| Precedents                | <ul style="list-style-type: none"> <li>• Cherryduck Studios, Wapping London</li> <li>• Greenwich Studios, Greenwich</li> <li>• Liverpool Studios, Liverpool</li> </ul>   |



# Specialist workspaces for the digital, animation and immersive industries

|                           |  |
|---------------------------|--|
| What                      | <b>Small to medium scale flexible and equipped studio space</b>  |
| Rationale and opportunity | The screen industries workforce is largely composed of micro-businesses and freelancers operating from home. Many gravitate around larger businesses and assets located in London. Across the sector, there is consensus for new workspaces to be multi-purpose and mixed use. This allows for production practices and innovation, and can also act as an incubator for local talent. The demand for animation and VFX content for immersive experiences such as AR and VR is booming. However, there is no shared hub or space to support this growth.                       |
| Key characteristics       | <ul style="list-style-type: none"> <li>• Specialist workspaces are usually industry-led or university-led</li> <li>• Provide a mix of desk spaces and specialist facilities</li> <li>• Support services: Business support/skills support/networking</li> <li>• Lower cost, flexible tenancies and a focus on collaboration means they are better suited to start-up businesses whose space needs are likely to change quickly as they grow. They also suit smaller businesses, sole traders and freelancers who place high value on the opportunity to collaborate.</li> </ul> |
| Requirements              | <ul style="list-style-type: none"> <li>• Central location with good public transport links and near anchor businesses and/or universities. This enables access to potential R&amp;D capacity and opportunities created by key institutions, including skilled labour</li> <li>• Purpose-built or converted office/industrial space</li> <li>• High broadband connectivity</li> </ul>   |
| Precedents                | <ul style="list-style-type: none"> <li>• The Nest Post, Wapping</li> <li>• The Engine Shed, Greenwich</li> <li>• PROTO, Gateshead</li> </ul>   |

# A regional screen hub mixing screen content, exhibition, events and talent development

|                           |  |
|---------------------------|--|
| What                      | <b>A new media/arts centre mixing screen content exhibition and development, with production and presentation spaces</b>   |
| Rationale and opportunity | To develop capacity in the region and establish a Thames Estuary Production Corridor identity, we must strengthen the role and prominence of locally developed intellectual property for the screen industries. Examples are original and adapted scripted content, exploitation of creative know-how and further innovation. This should encourage the development of authentic and distinctive stories and promote investment in artists and projects when they are commercially attractive. The Thames Estuary Production Corridor currently lacks regional screen hub(s). These spaces can bring together film exhibition and development, providing opportunities for audiences, artists and makers to learn and experiment. Their aim is to develop audiences or film and pathways into industry from a local workforce. |
| Key characteristics       | <ul style="list-style-type: none"> <li>• A bespoke model and value proposition for Thames Estuary Production Corridor: <ul style="list-style-type: none"> <li>◦ Leading film, culture and digital media in the region</li> <li>◦ Producing and presenting original ideas and content and curates a diverse programme of talent development, cinema exhibition, events and festivals</li> <li>◦ Identifying, nurturing and developing talent</li> <li>◦ Connecting artist and audiences</li> <li>◦ Pathfinder to new value in creative economy</li> <li>◦ A cultural destination</li> </ul> </li> <li>• Could include: multiple cinema screens, flexible creative workspace, restaurant/bar, community and event space, presentation space.</li> </ul>  |
| Requirements              | <ul style="list-style-type: none"> <li>• Town centre or riverside location ('a destination') with good public transport accessibility and access to London</li> <li>• Minimum 50,000sq.ft</li> <li>• High broadband connectivity</li> </ul>  |
| Precedents                | <ul style="list-style-type: none"> <li>• The Watershed, Bristol</li> <li>• HOME, Manchester</li> <li>• Centre des Arts, Enghien-Les-Bains (France)</li> </ul>  |



## A circular and reuse screen centre

|                           |  |
|---------------------------|--|
| <b>What</b>               | <b>An industry-leading centre of expertise providing support services and include provision for materials reuse, repurposing and recycling</b>   |
| Rationale and opportunity | The Thames Estuary Production Corridor has the opportunity to lead in sustainable screen production, mirroring the Thames Estuary's wider leadership in climate change. A new industry-leading centre for sustainable production would support, encourage and enable to achieve that aim. The centre could include training provision for productions and screen industries practitioners to build the sector's expertise, knowledge and understanding of environmental sustainability. It could also include provision for materials reuse, repurposing and recycling, creating a specialist circular marketplace specific to the stage, screen and event sector. This would provide a range of green fabrication training and job opportunities, creating new pathways into the creative industries. |
| Key characteristics       | <ul style="list-style-type: none"> <li>• A bespoke model and value proposition for the Thames Estuary Production Corridor: <ul style="list-style-type: none"> <li>◦ Leading on net zero and circular best practices in the screen industries</li> <li>◦ Working with production corridor assets and productions</li> <li>◦ Providing a range of green fabrication training &amp; job opportunities, creating new pathways into the creative industries</li> <li>◦ A partnership with industry and institutional leaders (logistics, screen provider, institution and higher education institutions)</li> </ul> </li> </ul>   |
| Requirements              | <ul style="list-style-type: none"> <li>• Located within or near existing or pipeline large-scale screen facility</li> </ul>  |
| Precedents                | <ul style="list-style-type: none"> <li>• Re-Set Scenery, Scotland</li> <li>• CAMA, Southend</li> </ul>   |

# What comes next?

## **Accelerator projects and pipeline development**

Thames Estuary Production Corridor partners will continue to work together to develop the current set of accelerator projects in Tower Hamlets, Basildon and Margate and provide tailored support to ensure their long-term success. By securing public and private investment in these projects, we can deliver large scale impact.

Looking beyond these projects, we will explore further opportunities within the project pipeline with the ambition to work in more places and with more partners. Together we work to deliver new cultural production projects, strategically positioned to build capacity and accommodate creative industries growth in the Thames Estuary for years to come.

## **Governance**

To support this important work, a new advisory board for the Thames Estuary Production Corridor is now in place to provide leadership and advocacy. The Board includes high-level representation for the estuary's cultural production sector, from grassroots organisations to major cultural institutions.



The board comprises senior sector specialists with a key role in overseeing implementation of the next stages of the Thames Estuary Production Corridor strategy. The board will work closely with lead partners Creative Estuary, Thames Estuary Growth Board and explore ways to create better networks, develop collaborations and strategically support production businesses in accessing resources, finance and new markets.

## **Investment**

The screen and fashion design and manufacturing sectors are recognised priorities for investment in the Thames Estuary. The Thames Estuary Growth Board works with investors to match opportunities to funding in the region. The Growth Board is an investment partner, investing in early-stage projects as a catalyst for significant new private sector investment and will work with other Thames Estuary Production Corridor partners to secure investment into creative production in the region.



Royal Opera House production workshop at High House Production Park, Purfleet



# Get in touch

If you want to learn more about the Thames Estuary Production Corridor, connect with delivery partners or explore investment opportunities please contact:

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**MAYOR OF LONDON**

**CREATIVE  
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**SOUTH EAST  
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